

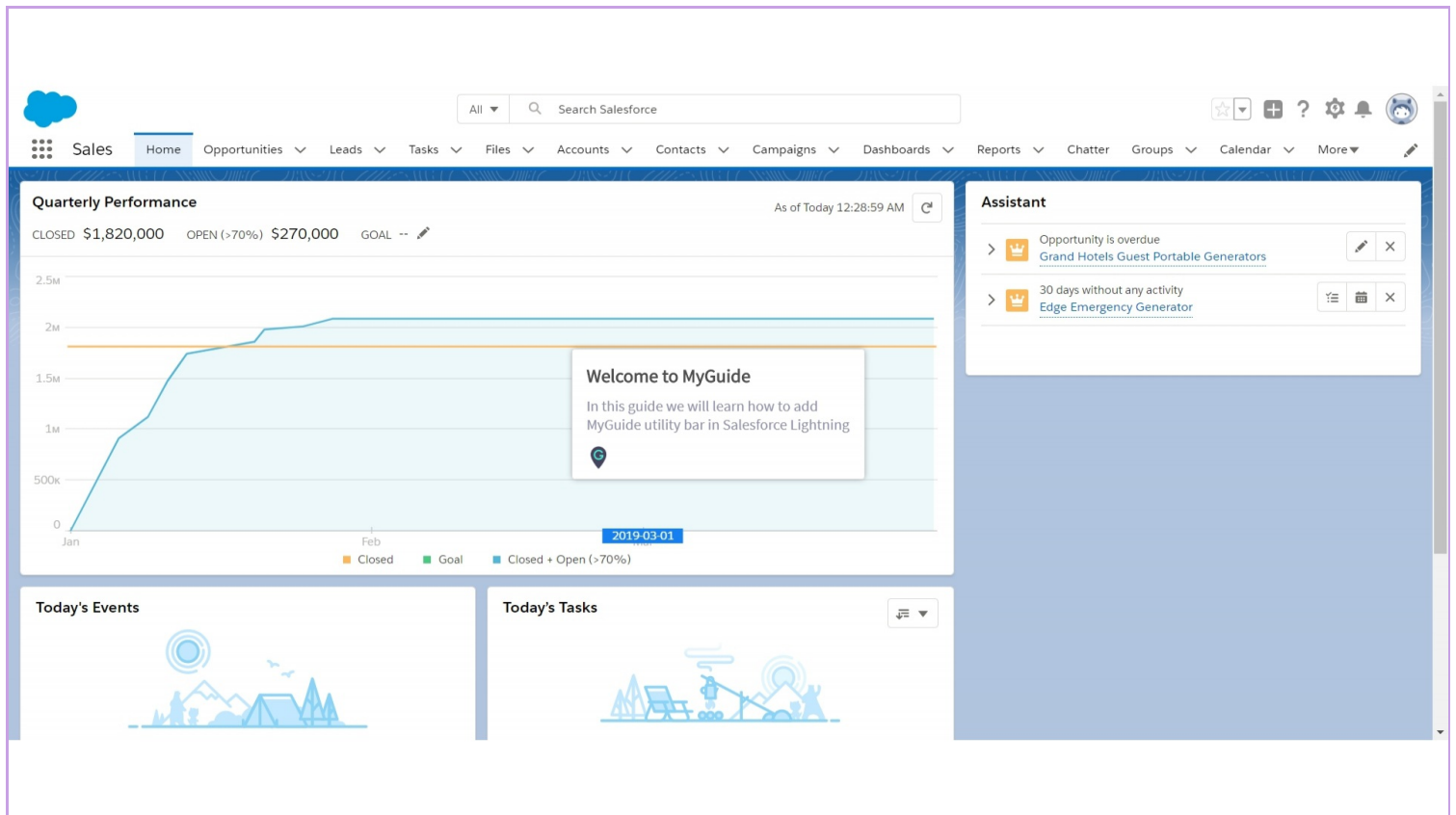


Add MyGuide Utility Bar to App

Step: 01

Welcome to MyGuide

In this guide we will learn how to add MyGuide utility bar in Salesforce Lightning



Step: 02

Click the gear cog

The image shows a Salesforce dashboard interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various utility icons. A callout box with the text "Click the gear cog" points to the gear icon in the top right corner. Below the navigation bar, the main content area is divided into several sections. On the left, there is a "Quarterly Performance" chart showing sales data from July to September. Below this, there are two sections: "Today's Events" and "Today's Tasks". On the right, there is an "Assistant" panel displaying a list of reminders. The dashboard is styled with a blue and white color scheme.

Quarterly Performance
As of Sep 8, 2018 1:00:30 PM

CLOSED \$2,375,000 OPEN (>70%) \$665,000 GOAL --

3.6M
3M
2.4M
1.8M
1.2M
600k
0

Jul Aug Sep

■ Closed ■ Goal ■ Closed + Open (>70%)

Today's Events

Looks like you're free and clear the rest of the day.

[View Calendar](#)

Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

[View All](#)

Assistant

- > 30 days without any activity [STARK-](#)
- > 30 days without any activity [MyGuide - Microsoft - Q4 2018](#)
- > 30 days without any activity [Microsoft-](#)
- > 30 days without any activity [ACME](#)

Step: 03

Click on "Setup"

The screenshot displays the Salesforce dashboard interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and a menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and Dashboards. Below the navigation bar, the main content area is divided into several sections. On the left, there is a 'Quarterly Performance' chart showing sales data from July to September. The chart includes a line for 'Closed + Open (>70%)' and a horizontal line for the 'Goal'. The data shows a steady increase in sales over the quarter, reaching approximately 3.6M by September. Below the chart, there are two sections: 'Today's Events' and 'Today's Tasks'. 'Today's Events' shows a message: 'Looks like you're free and clear the rest of the day.' with a 'View Calendar' link. 'Today's Tasks' shows a message: 'Nothing due today. Be a go-getter, and check back soon.' with a 'View All' link. On the right side of the dashboard, there is a 'Click on "Setup"' callout box. This box points to the 'Setup' icon in the top right corner of the dashboard. The 'Setup' icon is a gear icon. Below the 'Setup' icon, there is a dropdown menu with the following options: 'Setup for current app', 'Service Setup', 'Developer Console', and 'Edit Page'. The 'Setup' icon is highlighted with a blue border, and the 'Click on "Setup"' callout box is pointing to it.

Step: 04

Enter "App Manager"

The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, the "Setup" tab is selected, and a "Quick Find" search bar is visible. A callout box with the text "Enter 'App Manager'" is positioned over the search bar. The main content area displays three cards: "mySalesforce", "Go Mobile", and "Visit AppExchange". Below these cards is a section titled "Most Recently Used" with a table of items.

NAME	TYPE	OBJECT
Contact Layout	Page Layout	Contact
Account Layout	Page Layout	Account
Lead Layout	Page Layout	Lead

Step: 05

Click on "App Manager"

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Apps' section is expanded, and 'App Manager' is highlighted. A callout box points to the 'App Manager' link with the text 'Click on "App Manager"'. The main content area displays three cards: 'mySalesforce', 'Go Mobile', and 'Visit AppExchange'. Below these cards is a 'Most Recently Used' section with a table of recent items.

Search Setup

Setup Home Object Manager

app manager

Apps

App Manager

Didn't find what you're looking for? Try using Global Search.

Click on "App Manager"

mySalesforce

Use mySalesforce to create your own branded mobile app.

Learn More Take the Trailhead Module

Go Mobile

Prepare the mobile app for your users.

Get Started

Visit AppExchange

Extend Salesforce with the #1 business app marketplace.

Get Started

Most Recently Used

10 items

NAME	TYPE	OBJECT
Contact Layout	Page Layout	Contact
Account Layout	Page Layout	Account
Lead Layout	Page Layout	Lead

Step: 06

Select any Lightning App

The screenshot shows the Salesforce Lightning Experience App Manager interface. A callout box with a location pin icon says "Select any Lightning App". The interface displays a list of 17 items, sorted by App Name and filtered by all appmenuitems - TabSet Type. The list includes various apps like Bolt Solutions, Community, Content, EdCast for Salesfor..., Lightning Usage App, Marketing, MyGuide, Platform, Sales, Sales Console, Salesforce Chatter, Service, Service Console, and Site.com. The left sidebar shows the navigation menu with options like Data, Apps, Connected Apps, and Mobile Apps.

	APP NAME ↑	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED...	APP TYPE	VI...
3	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	1/31/2019 11:45 PM	Lightning	✓
4	Community	Community	Salesforce CRM Communities	1/31/2019 11:44 PM	Classic	✓
5	Content	Content	Salesforce CRM Content	1/31/2019 11:44 PM	Classic	✓
6	EdCast for Salesfor...	Edcast_App		2/1/2019 12:54 AM	Connected (Managed)	
7	Lightning Usage App	LightningInstrumentati...	View Adoption and Usage Metrics for Lightning Experience	1/31/2019 11:44 PM	Lightning	✓
8	Marketing	Marketing	Best-in-class on-demand marketing automation	1/31/2019 11:44 PM	Classic	✓
9	MyGuide	SalesU		2/1/2019 12:54 AM	Lightning (Managed)	✓
10	Platform	Platform	The fundamental Lightning Platform	1/31/2019 11:44 PM	Classic	
11	Sales	Sales	The world's most popular sales force automation (SFA) solution	1/31/2019 11:44 PM	Classic	
12	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	1/31/2019 11:44 PM	Lightning	✓
13	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on on...	1/31/2019 11:44 PM	Lightning	✓
14	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	1/31/2019 11:44 PM	Classic	✓
15	Service	Service	Manage customer service with accounts, contacts, cases, and more	1/31/2019 11:44 PM	Classic	✓
16	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records a...	1/31/2019 11:44 PM	Lightning	✓
17	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com ...	1/31/2019 11:44 PM	Classic	

Step: 07

Click on drop down

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains a navigation menu with the following items: Data, Apps, App Manager (selected), AppExchange Marketplace, Connected Apps, Connected Apps OAuth..., Manage Connected Apps, Installed Packages, Lightning Bolt, Flow Category, Lightning Bolt Solutions, Mobile Apps, and Salesforce. The main content area is titled 'Lightning Experience App Manager' and displays a table of 17 items, sorted by App Name. The table columns are: APP NAME, DEVELOPER NAME, DESCRIPTION, LAST MODIFIED, APP TYPE, and VISIBILITY. A callout box with the text 'Click on drop down' points to the dropdown arrow in the 'Visibility' column for the 'Sales' app.

	APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	APP TYPE	VISIBILITY
3	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	1/31/2019 11:45 PM	Lightning	✓
4	Community	Community	Salesforce CRM Communities	1/31/2019 11:44 PM	Classic	✓
5	Content	Content	Salesforce CRM Content	1/31/2019 11:44 PM	Classic	✓
6	EdCast for Salesfor...	Edcast_App		2/1/2019 12:54 AM	Connected (Managed)	
7	Lightning Usage App	LightningInstrumentati...	View Adoption and Usage Metrics for Lightning Experience	1/31/2019 11:44 PM	Lightning	✓
8	Marketing	Marketing	Best-in-class on-demand marketing automation	1/31/2019 11:44 PM	Classic	✓
9	MyGuide	SalesU		2/1/2019 12:54 AM	Lightning (Managed)	✓
10	Platform	Platform	The fundamental Lightning Platform	1/31/2019 11:44 PM	Classic	
11	Sales	Sales	The world's most popular sales force automation (SFA) solution	1/31/2019 11:44 PM	Classic	
12	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	1/31/2019 11:44 PM	Lightning	✓
13	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on on...	1/31/2019 11:44 PM	Classic	✓
14	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	1/31/2019 11:44 PM	Classic	✓
15	Service	Service	Manage customer service with accounts, contacts, cases, and more	1/31/2019 11:44 PM	Classic	✓
16	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records a...	1/31/2019 11:44 PM	Lightning	✓
17	Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com ...	1/31/2019 11:44 PM	Classic	

Step: 08

Click on "Edit"

The screenshot displays the Salesforce Lightning Experience App Manager. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area shows a list of 17 apps, sorted by App Name. A callout box highlights the 'Edit' button for the 'Sales Console' app.

APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	APP TYPE	VI...
2 App Launcher	AppLauncher	App Launcher tabs	9/7/2018 12:14 PM	Classic	✓
3 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/7/2018 12:14 PM	Lightning	✓
4 Community	Community	Salesforce CRM Communities	9/7/2018 12:14 PM	Classic	✓
5 Content	Content	Salesforce CRM Content	9/7/2018 12:14 PM	Classic	✓
6 EdCast for Salesforce	Edcast_App		9/20/2018 1:57 AM	Connected (Managed)	
7 GuideMe	SalesU		9/20/2018 1:57 AM	Lightning (Managed)	✓
8 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/7/2018 12:14 PM	Lightning	✓
9 Marketing	Marketing	Best-in-class on-demand marketing automation	9/7/2018 12:14 PM	Classic	✓
10 Platform	Platform	The fundamental Lightning Platform	9/7/2018 12:14 PM	Classic	✓
11 Sales	Sales	The world's most popular sales force automation (SFA) solution	9/7/2018 12:14 PM	Classic	✓
12 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	9/7/2018 12:14 PM	Lightning	✓
14 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	9/7/2018 12:14 PM	Classic	✓
15 Service	Service	Manage customer service with accounts, contacts, cases, and more	9/7/2018 12:14 PM	Classic	✓
16 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across custo...	9/7/2018 12:14 PM	Lightning	✓
17 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application...	9/7/2018 12:14 PM	Classic	✓

Step: 09

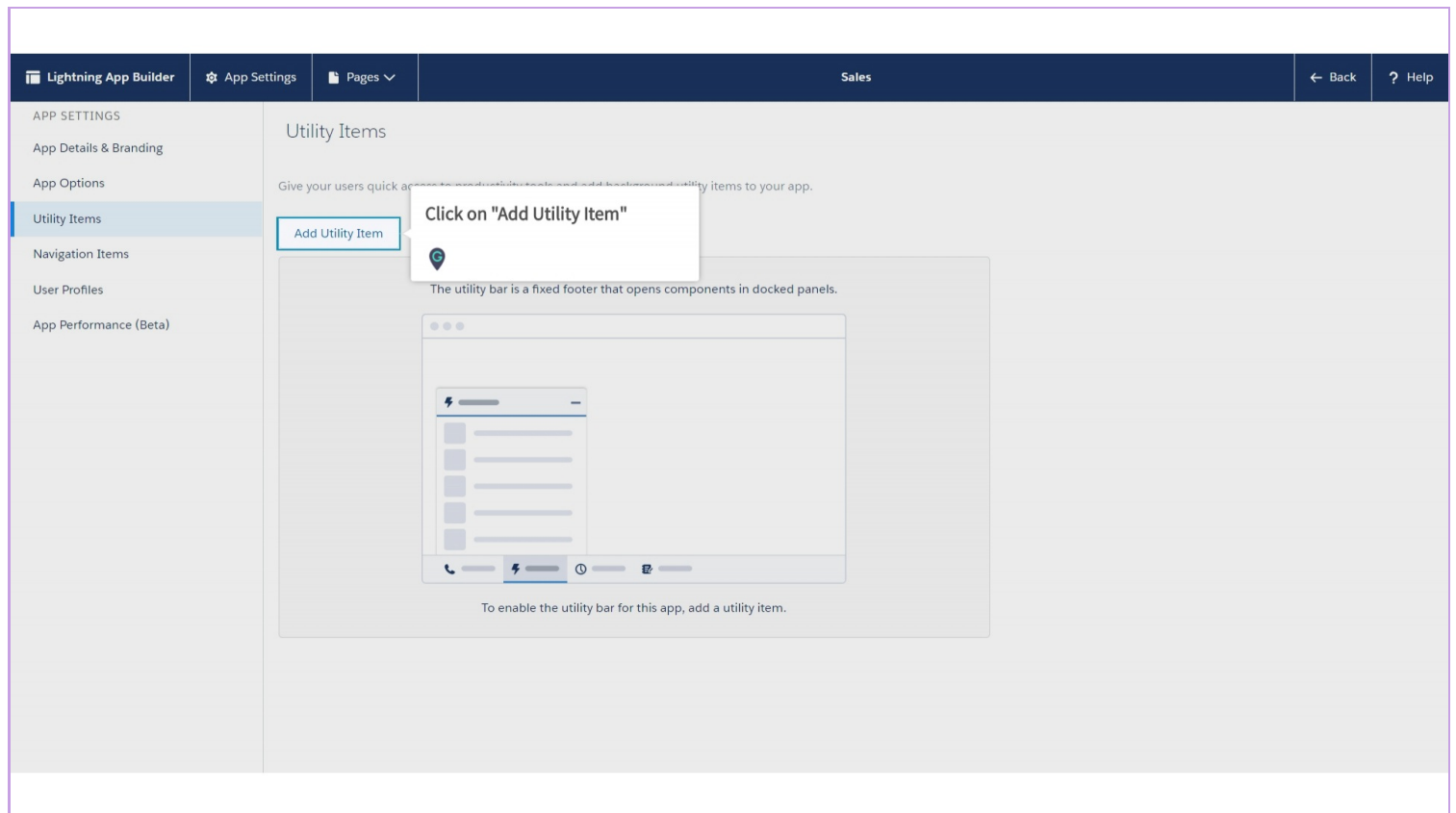
Click on "Utility Items"

The screenshot displays the Lightning App Builder interface for configuring an app named "Sales". The top navigation bar includes "Lightning App Builder", "App Settings", "Pages", and "Sales", along with "Back" and "Help" links. The left sidebar, under "APP SETTINGS", lists "App Details & Branding", "App Options", "Utility Items", "Navigation Items", "User Profiles", and "App Performance (Beta)". The "Utility Items" option is highlighted, and a callout box with the text "Click on 'Utility Items'" points to it. The main content area, titled "App Details & Branding", contains the following sections:

- App Name:** A text field containing "Sales".
- * Developer Name:** A text field containing "LightningSales".
- Description:** A text area containing "Manage your sales process with accounts, leads, opportunities, and more".
- App Branding:**
 - Image:** A placeholder for an app image with an "Upload" button.
 - Primary Color Hex Value:** A dropdown menu showing a blue color and a text field containing "#0070D2".
 - Org Theme Options:** A checkbox labeled "Use the app's image and color instead of the org's custom theme".
- App Launcher Preview:** A preview of the app launcher showing a blue icon with a lightning bolt and the text "Sales" and "Manage your sales process with accounts, leads, oppor...".

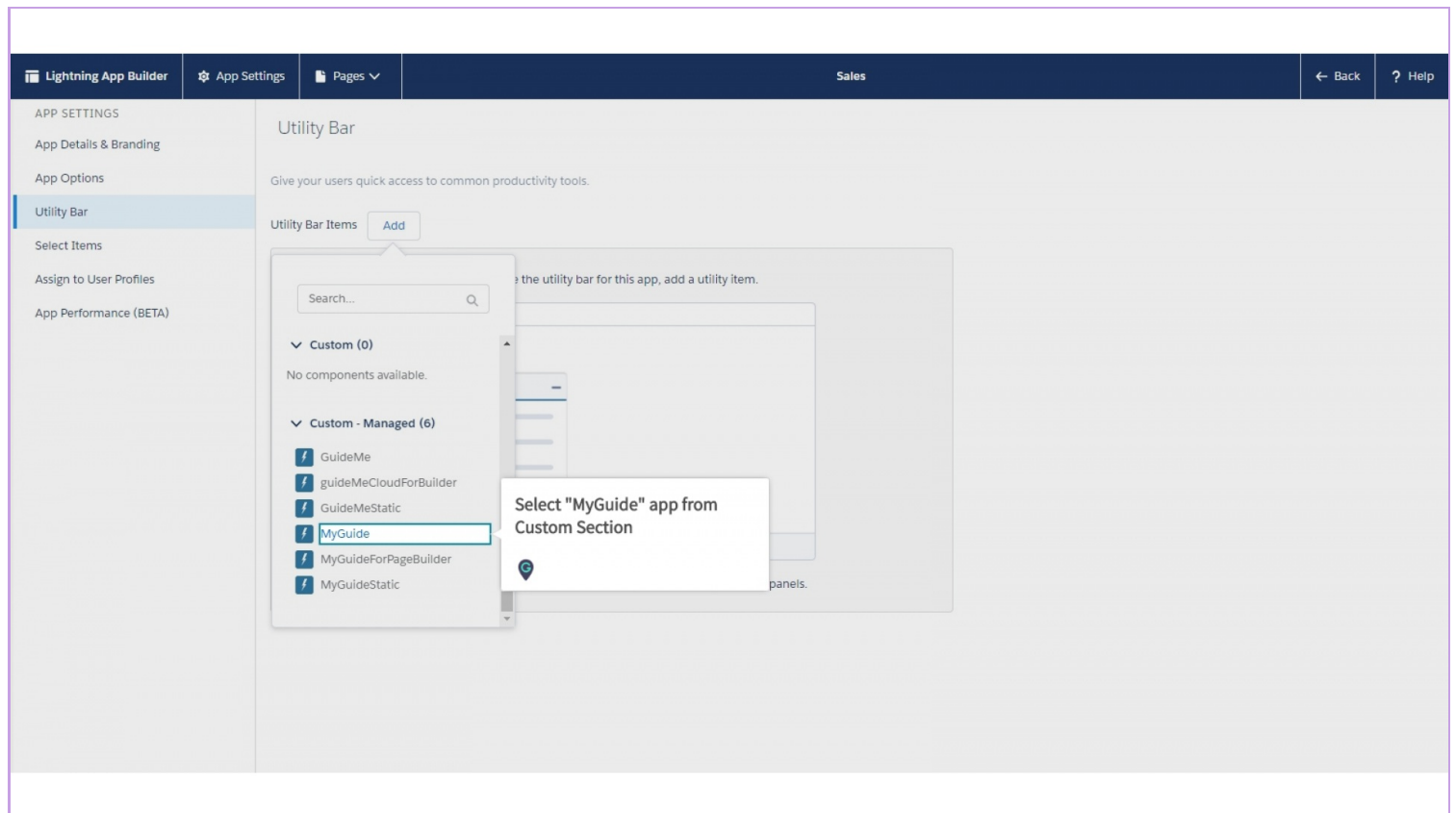
Step: 10

Click on "Add Utility Item"



Step: 11

Select "MyGuide" app from Custom Section



Step: 12

Utility Item Properties

Change the properties while adding Label: MyGuidePanel Width: 600Panel Height: 500

The screenshot displays the Lightning App Builder interface. On the left, a sidebar lists navigation options: APP SETTINGS, App Details & Branding, App Options, Utility Items (highlighted), Navigation Items, User Profiles, and App Performance (Beta). The main area is titled 'Utility Items' and includes a description: 'Give your users quick access to productivity tools and...'. Below this is an 'Add Utility Item' button. A modal dialog box titled 'Utility Item Properties' is open, showing the following details:

- Label:** MyGuide
- Panel Width:** 600
- Panel Height:** 500

The dialog also includes a 'Remove' button and a 'Start automatically' checkbox. The background shows a preview of the 'MyGuide' utility item with a lightning bolt icon and a 'fallback' label.

Step: 13

Select this checkbox to start automatically

The screenshot shows the 'Lightning App Builder' interface. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Sales'. The left sidebar lists 'APP SETTINGS' with sub-items: 'App Details & Branding', 'App Options', 'Utility Items' (selected), 'Navigation Items', 'User Profiles', and 'App Performance (Beta)'. The main content area is titled 'Utility Items' and contains a 'Utility Item Properties' section. This section includes the following fields:

- * Label: MyGuide
- Icon: fallback X
- Panel Width: 500
- Panel Height: 600
- ☒ Start automatically
- Window Height: 100%

A callout box with a location pin icon points to the 'Start automatically' checkbox, containing the text: 'Select this checkbox to start automatically'.

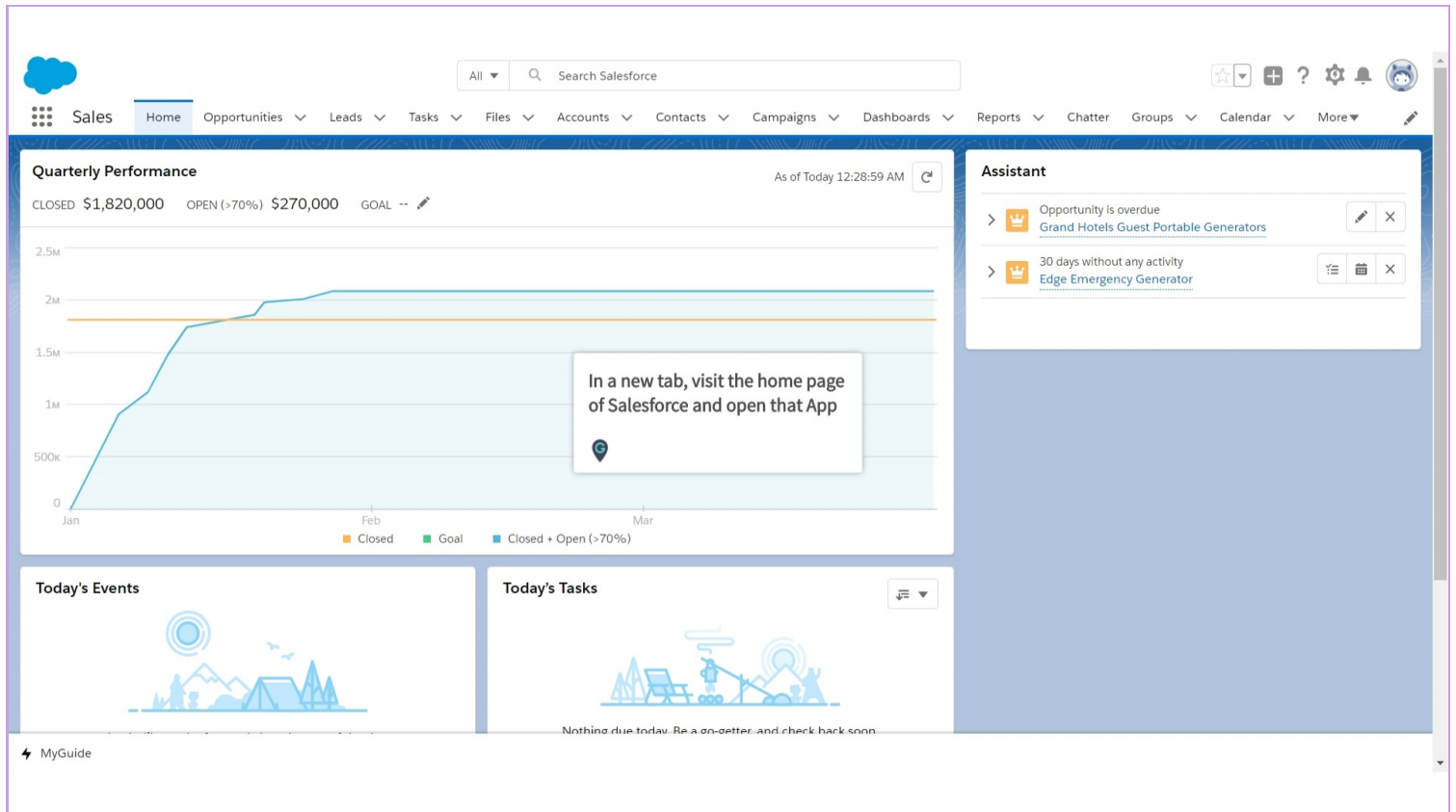
Step: 14

Click on "Save"

The screenshot displays the Lightning App Builder interface. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Sales'. The left sidebar lists 'APP SETTINGS' with options: 'App Details & Branding', 'App Options', 'Utility Bar' (selected), 'Select Items', 'Assign to User Profiles', and 'App Performance (BETA)'. The main content area is titled 'Utility Bar' and contains the text 'Give your users quick access to common productivity tools.' Below this, there is a section for 'Utility Bar Items' with an 'Add' button. A card for 'MyGuide' is shown, featuring a lightning bolt icon and a 'Properties' panel. The 'Properties' panel includes 'Utility Item Properties' with fields for 'Label' (MyGuide), 'Icon' (fallback), 'Panel Width' (600), and 'Panel Height' (500). A checkbox for 'Load in background when app opens' is present. A callout box with a location pin icon and the text 'Click on "Save"' points to the 'Save' button in the bottom right corner of the interface.

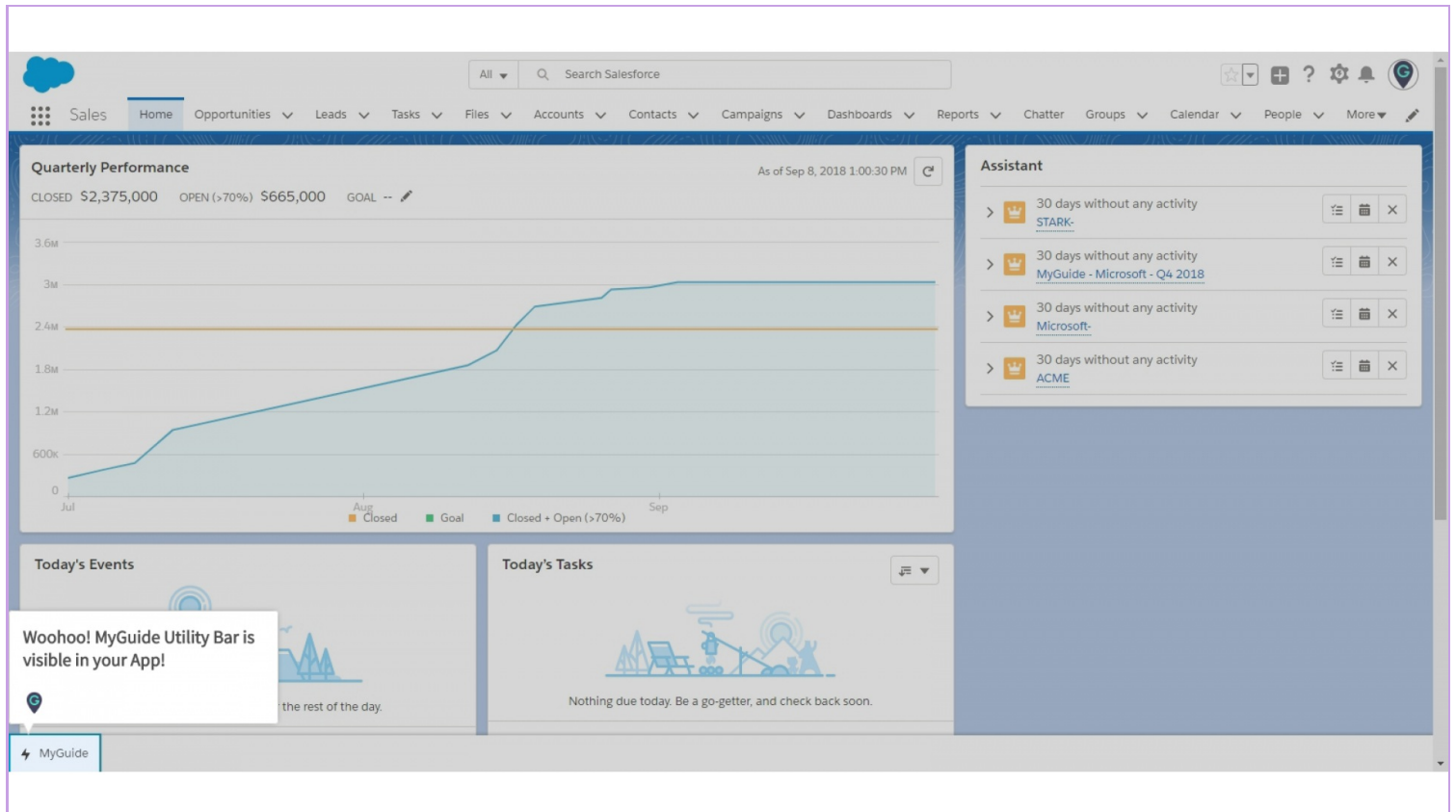
Step: 15

In a new tab, visit the home page of Salesforce and open that App



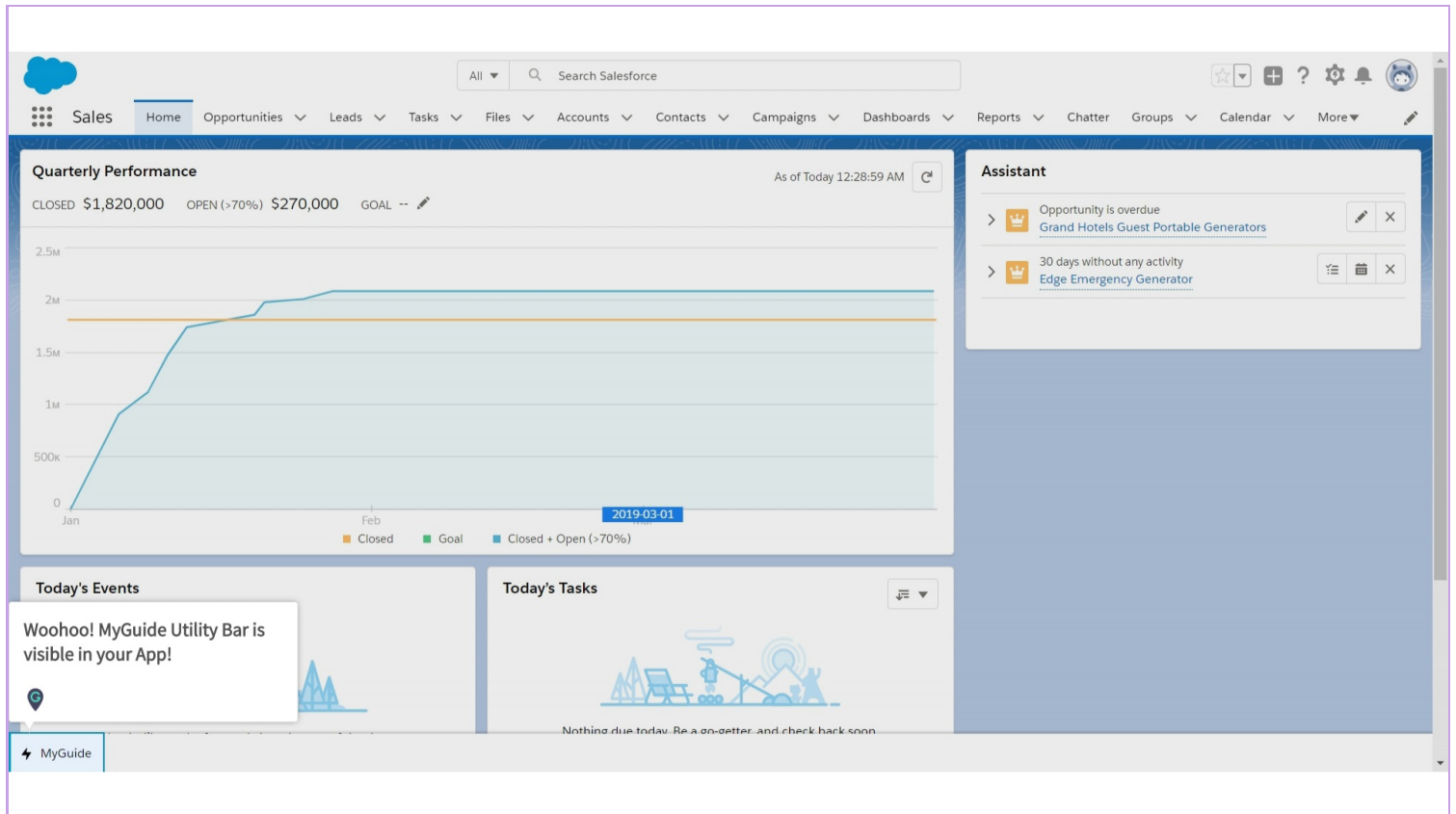
Step: 16

Woohoo! MyGuide Utility Bar is visible in your App!



Step: 17

Woohoo! MyGuide Utility Bar is visible in your App!



Thank You!

myguide.org